## Appendix B Correlation Tables

New probate rule number	Title of the New Rule	Former probate rule number
Prefatory		Preamble
comment		
	PART ONE: GENERAL INFORMATION	
1	Scope, Applicability, and Construction	1
2	Definitions	2
3	Probate Case and Proceedings	2(O), 2(P)
4	Applicability of Other Rules	3
5	Contested and Uncontested Hearings	new
6	Non-Probate Proceedings Filed Within or Consolidated with a Probate Case	4(B), 4(C)
7	Document Captions	5
8	Confidential Documents and Information	7
9	Sealing and Unsealing Court Documents	new
10	Acknowledgment of a Consent, Waiver, Renunciation, or Nomination	14
11	Personal Service of Certain Documents	8
12	Telephonic and Video Attendance and Testimony	11
	PART TWO: INITIATION OF PROBATE PROCEEDINGS	
13	Probate Information Form and Notice of Change of Contact Information Form	6
14	Applications	16
15	Petitions	17, 13(B) & 13(D), 27
16	Notice of Initial Hearing on a Petition	9
17	Initial Hearing on a Petition	12
18	Dismissal for Failure to Obtain an Initial Hearing Date	15.2(D)
	PART THREE: SUBSEQUENT EVENTS AND ACTIONS	
19	Motions and Oral Argument	18, 13(A) & 13(D)
20	Conference	new
21	Alternative Dispute Resolution	29
22	Settlement Conference	new
23	Evidentiary Hearing	28(C)
24	Enforcement of Court Orders	35
25	Compliance and Order to Show Cause Hearings	new
26	Proposed Orders, Decrees, and Judgments	15
	PART FOUR: CONTESTED PROCEEDINGS	
27	Management of Contested Probate Proceedings	28(A)
28	Disclosure and Discovery	28(B)
	Demand for Jury Trial	new

	PART FIVE: GENERAL ROLES AND DUTIES OF PARTICIPANTS	
30	Representation of Parties	10(B)
31	Duties of a Fiduciary's Attorney	10(D)
32	Statutory Representative (fka Guardian Ad Litem)	15.1
33	Compensation for Fiduciaries, Attorneys, and Statutory Representatives	33
34	Prudent Management of Costs	10.1
35	Repetitive Filings; Vexatious Conduct; Remedies	10(G), 18(C)
	repetitive i milgs) venations continuely itemedies	10(0)) 10(0)
	PART SIX: RULES THAT APPLY TO GUARDIANSHIPS, CONSERVATORSHIPS, AND DECEDENTS' ESTATES	
36	Order Appointing Guardian, Conservator, Personal Representative, or Special Administrator	22
37	Order to Fiduciary	25
38	Training for Non-Licensed Fiduciaries	27.1
39	Issuing and Recording Letters of Appointment	26
40	Duties of Court-Appointed Fiduciaries	10(C)
	The second secon	
	PART SEVEN: RULES THAT APPLY ONLY TO GUARDIANSHIPS AND CONSERVATORSHIPS	
41	Appointment of an Attorney, Medical Professional, or Investigator in a	19
	Guardianship or Protective Proceeding	
42	Training, Role, and Termination of an Attorney for a Subject Person	10(E)
43	Duties of Investigators	10(F)
44	Appointment of a Temporary Guardian or Temporary Conservator	23, 13(C)
45	Conservator's Inventory, Budget, and Account	30(A), 30(B),
		30.2, 30.3
46	Annual Guardian Reports	30(C)
47	Guardian's Inpatient Psychiatric Treatment Authority	24, 36
48	Remedies for Non-Compliance by a Guardian or Conservator	15.2(C)
49	Administrative Closure of a Minor Guardianship or Minor Conservatorship	15.2(B)
	PART EIGHT: RULES THAT APPLY ONLY TO DECEDENTS' ESTATES AND TRUSTS	
50	Personal Representative's Inventory and Account	31
51	Administrative Closure of a Decedent's Estate and Termination of Appointment	15.2(A)
52	Trustee's Account	32
	PART NINE: RECOVERIES FOR, AND DISTRIBUTIONS TO, MINORS AND PROTECTED ADULTS	
53	Settlement of Claims for Minors or Adults in Need of Protection	37
54	Distributions to Persons Under Disability	34
	·	
	PART TEN: FORMS	
55	Forms	38

## **Deleted Rules**

The following rules were deleted and <u>not</u> incorporated within another rule:

Rule #	Rule Title
20	Affidavit of Proposed Appointee
21	Background Check Requirements
26.1	Written Findings on Appointment
30.1	Financial Order

## **Forms**

The Probate Rules refer to the following forms:

Form #	Form Title	In Rule #
1	Order to Personal Representative and Acknowledgement and Information to	37
	Heirs/Devisees	
2	Order to Guardian and Acknowledgement	37
2-S	Supplemental Order to Guardian with Inpatient Psychiatric Treatment Authority	47
	and Acknowledgement	
3	Order to Conservator and Acknowledgement	37
3-M	Order to Conservator and Acknowledgement for Minors	37
4	Order to Guardian and Conservator and Acknowledgement	37
5	Conservatorship Estate Budget	45
6	First Conservator's Account	45
7	Conservator's Account	45
8	Final Conservator's Account	45
9	Simplified Conservator's Account	45
10	Proof of Restricted Account from Financial Institution	36
11	Probate Information Form for Decedent's Estate	13
12	Probate Information Form for Guardianship/Conservatorship	13
13	Notice of Change of Fiduciary's Contact Information	13
14	Notice of Change of Ward's Contact Information	13
15	Authorization to Obtain Certified Copy of a Sealed Document	9